

PROPOSAL FORM - PLUM ORCHARD
U.S. DEPARTMENT OF THE INTERIOR
NATIONAL PARK SERVICE - SOUTHEAST REGIONAL OFFICE
CUMBERLAND ISLAND NATIONAL SEASHORE

Form Instructions

The best proposal will be selected through an evaluation of the timely responses received, based on the factors identified below. The three principal evaluation factors are:

- (1) the experience and related background of the proposer;
- (2) conformance to the terms and conditions of the RFP in the area of historic preservation and cultural landscape maintenance; and
- (3) the proposer's financial capability of meeting the requirements set forth in the RFP.

The Plum Orchard Proposal Form contains eleven REQUIREMENTS (A - K) that require a response. Some are as simple as "yes or no" answers, while others require a more detailed explanation. The REQUIREMENTS are intended to identify the information considered essential to meet the basic objectives of the NPS with regard to the principal evaluation factors.

The NPS will use answers to the REQUIREMENTS to determine, in part, whether a proposal is responsive and a potential candidate for the lease. Failure to answer "yes" to any of the required questions makes the proposer non-responsive and generally unsuitable for further lease consideration. Answering "yes" to a REQUIREMENT but indicating elsewhere in the proposal that the "yes" answer is inaccurate will also make the proposal non-responsive.

Each REQUIREMENT is followed by an OPTION. Optional answers provide direction on the manner in which a proposer can enhance its proposal. By addressing one or more of the OPTIONS, a proposer is afforded opportunities to submit a superior proposal. The optional information will be the basis for the final selection.

Each of the sections must be filled out as completely as possible for full consideration in the selection process. If a question is not applicable to the proposed operation, please indicate with "N/A" or other response. (In all cases, over responding is better than a minimum response. Feel free, as indicated, to attach additional sheets.)

Proposals to provide direct or indirect monetary or other benefits to the park or government that are not within the scope, requirements, purpose, and control of the lease or the NPS will not be considered as elements of a better proposal.

The proposal form and related materials submitted should reflect the entire proposal being made. Proposers should keep in mind that their written submissions will be considered by the NPS as their full and final proposal in response to the RFP. Proposers are cautioned that nothing should be assumed to be known about the proposal or about the proposer or be presumed to be in the possession of the NPS from previous correspondence or submissions. Each proposal should be complete when submitted.

It is the intention of the NPS to select a lessee from the proposals made without further submittals or presentations. However, the NPS reserves the right to request additional information or presentations from the proposers which submitted the more advantageous proposals if a "best proposal" cannot be selected from the initial submittals.

All proposals must be received at the offices of the National Park Service, Atlanta Federal Center, 1924 Building, 100 Alabama Street, Atlanta, Georgia 30303 by 4:30 PM, December 21, 2001. Please send proposals to the attention of John Barrett.

No proposals will be accepted or given any consideration if they arrive after the deadline.

PROPOSAL FORM - PLUM ORCHARD

U.S. DEPARTMENT OF THE INTERIOR

NATIONAL PARK SERVICE - SOUTHEAST REGIONAL OFFICE

CUMBERLAND ISLAND NATIONAL SEASHORE

A. Name: _____

B. Present Address: _____

C. Contact Person: _____

D. Present Telephone: _____

E. FAX Number: _____

F. e-Mail Address: _____

I. PROGRAM PROPOSAL: An evaluation of the ability and willingness of each proposer to meet the goals and objectives of the RFP, the evaluation criteria, the leasing guidelines, and the required preservation treatment.

REQUIREMENT A -- FUNDING FOR HISTORIC PRESERVATION

THE PROPOSAL OFFERS FUNDING FOR THE PHASE III REHABILITATION OF PLUM ORCHARD MANSION AS WELL AS OPERATIONS AND A COMPREHENSIVE MAINTENANCE PROGRAM. THE PROPOSER MAKES AN INITIAL COMMITMENT TO PROVIDING ALL OF THE FUNDING NECESSARY TO ACCOMPLISH PHASE III OF THE REHABILITATION PROGRAM DESCRIBED FOR PLUM ORCHARD.

YES _____ NO _____

Describe the proposed lease/rehabilitation program in as much detail as possible. Also, describe how the proposal will meet the requirements and evaluation criteria set forth in the RFP. (Attach continuation sheets as necessary.)

OPTION A -- FUNDING FOR HISTORIC PRESERVATION

A HIGHER CONTRIBUTION TO THE FUNDING NECESSARY TO ACCOMPLISH PHASE III OF THE REHABILITATION PROGRAM DESCRIBED FOR PLUM ORCHARD. ADDITIONAL FUNDING FOR ALL OR PART OF PHASE II IS CONSIDERED A SUPERIOR PROPOSAL.

Describe the nature of the increased contribution and proposed rehabilitation/preservation projects included. Examples of projects may include reconstruction of the Plum Orchard carriage house, and restoration of the swimming pool and/or elements of the cultural landscape. (Attach continuation sheets as necessary.)

REQUIREMENT B – CONFORMANCE WITH HISTORIC PRESERVATION REQUIREMENTS AND STANDARDS

THE PROPOSER DEMONSTRATES AN UNDERSTANDING OF THE PROPOSED BUILDING AND IMPROVEMENT PROGRAM AND OF ALL REPAIR AND REHABILITATION REQUIREMENTS OF THE LEASE AND AN ABILITY TO COMPLETE THE REQUIREMENTS IN A TIMELY MANNER. THE PROPOSER COMMITS TO CARRYING OUT THOSE REQUIREMENTS IN CONFORMANCE WITH THE SECRETARY’S STANDARDS FOR REHABILITATION.

YES _____

NO _____

Discuss how the project will conform to the Secretary of the Interior's *Standards for Rehabilitation* (Appendix A).

OPTION B -- CONFORMANCE WITH HISTORIC PRESERVATION REQUIREMENTS AND STANDARDS

A SUPERIOR PROPOSAL INCLUDES PAST EXPERIENCE OR EXPERTISE IN HISTORIC PRESERVATION.

To evaluate the capability of these professionals, the following information is required

Name of Person or Firm

Principal(s) Involved in Proposed Project

Telephone

Address

City/Town State Zip

How many years of historic preservation experience can the proposer document? (No consideration will be given for projects involving private residences.) _____ Years

ATTACH ILLUSTRATIVE MATERIAL OF PROJECTS DESIGNED AND/OR MANAGED BY THE PRINCIPAL (S) IDENTIFIED ABOVE.

Assemble a detailed project schedule, measured from authorization to proceed (Month/Year) through commencement of construction to completion of preservation treatment (i.e. rehabilitation). (Attach continuation sheets as necessary.)

_____/_____/_____ Authorization to proceed _____

REQUIREMENT C – VISITOR ACCESS

ACCESS TO PLUM ORCHARD BY ISLAND VISITORS WILL BE REQUIRED OF ANY APPROVED LEASE. THE PROPOSER AGREES TO ACCEPT NPS GUIDED TOUR ACCESS (FROM 1:00 PM UNTIL 5:00 P.M.), TWO DAYS A WEEK IN CERTAIN DESIGNATED ROOMS AND HAVE THE GROUNDS OPEN TO THE VISITING PUBLIC FROM 8:00 A.M. TO 5 P.M. DAILY.

YES _____ NO _____

OPTION C -- VISITOR ACCESS

A SUPERIOR PROPOSAL WILL ALLOW MORE FLEXIBILITY IN TOUR HOURS AND/OR ADDITIONAL TOUR DAYS OR EXPANDED TOURS OF PLUM ORCHARD AND THE GROUNDS.

In addition to the above minimum requirements, describe how the proposed use of Plum Orchard mansion and grounds after the rehabilitation phase would accommodate day visitors. (Attach continuation sheets as necessary.)

REQUIREMENT D – WILDERNESS IMPACTS

PROPOSER AGREES TO LIMIT THE NUMBER OF ROUND-TRIP VEHICLE TRIPS ON THE ROAD BETWEEN PLUM ORCHARD AND THE SOUTHERN WILDERNESS BOUNDARY TO ____ PER WEEK. (SEE APPENDIX ____.)

YES _____ NO _____

Describe how Plum Orchard will be accessed by water or by land. This includes both the rehabilitation phase and the operational or occupancy phase and the frequency of travel.

Rehabilitation Phase: _____

Operational or Occupancy Phase: _____

PROPOSER EXERCISES ACCESS REQUIREMENTS AND/OR CLIENT ACTIVITIES THAT REDUCE THE IMPACTS ON THE WILDERNESS, PRODUCE A MORE COMPATIBLE RELATIONSHIP WITH THE SURROUNDING WILDERNESS, OR SUPPORT WILDERNESS MANAGEMENT.

YES _____ NO _____

Describe how vehicular access will be limited through the wilderness and other activities associated with the proposed operation will support and promote wilderness management. (Attach continuation sheets as necessary.)

OPTION D -- WILDERNESS IMPACTS
NONE.

***** ***** ***** ***** *****

REQUIREMENT E – MAINTENANCE PROGRAM

FOLLOWING THE REHABILITATION AND DURING THE OCCUPANCY OF PLUM ORCHARD, THE MAINTENANCE ACTIVITIES PROPOSED ARE SYSTEMATIC AND REFLECT THE GOALS OF HISTORIC STRUCTURE AND CULTURAL LANDSCAPE PRESERVATION. AN ORGANIZED AND WELL-DEvised MAINTENANCE PROGRAM IS REFLECTED IN THE PROPOSAL. THE PROPOSER AGREES TO IMPLEMENT AN APPROVED MAINTENANCE PLAN WITHOUT CONDITIONS.

YES _____ NO _____

Describe proposed cyclical and/or long-term preservation maintenance activities: i.e., the overall

strategy for appropriate management of the property over the term of the lease. (Attach continuation sheets as necessary.)

OPTION E -- MAINTENANCE PROGRAM

**THE PROPOSER WILL CARRY OUT ADDITIONAL RESPONSIBILITIES THAT WILL
REDUCE GOVERNMENT EXPENSE.**

A superior proposal may include structural or cultural landscape maintenance beyond the normal cyclical and/or long-term preservation program required by the RFP. Describe any plans, in keeping with NPS guidelines, at no expense to the government. (Attach continuation sheets as necessary.)

***** ***** ***** ***** *****

**REQUIREMENT F – LEAST ADVERSE IMPACTS TO THE STRUCTURE AND THE
LANDSCAPE**

**THE PROPOSER AGREES TO MINIMIZE THE ADVERSE IMPACTS OF DAMAGE TO THE
HISTORIC STRUCTURE AND MAINTAIN THE GROUNDS IN GOOD CONDITION**

YES _____ NO _____

**OPTION F -- LEAST ADVERSE IMPACTS TO THE STRUCTURE AND THE LAND
SCAPE**

**THE SUPERIOR PROPOSAL EXPOSES PLUM ORCAHRD MANSION TO THE LEAST RISK
OF DAMAGE AND PROVIDES FOR THE IMPROVEMENT OF THE CULTURAL
LANDSCAPE.**

Explain planned protection for and mitigation of fire, storm and user damage. Describe the major elements of a cultural landscape plan and financial commitment (Attach continuation sheets as necessary.)

II. CONTRACT PROPOSAL: The contract stipulation of the proposal should contain terms consistent with the scope of the overall proposal.

Describe the requested lease terms, including the proposed lease payments that will take into consideration investments to be made by the lessee in the property. (Attach continuation sheets as necessary.)

Rent

Timing of Payments

III. STATEMENT OF MANAGEMENT QUALIFICATIONS: A summary of background information indicative of management experience and skills necessary for successful operation of an historic lease property.

REQUIREMENT G – MANAGERIAL OVERSIGHT

THE PROPOSER AGREES TO PROVIDE THE NECESSARY MANAGERIAL OVERSIGHT FOR PLUM ORCHARD AND THE CULTURAL LANDSCAPE AS REQUIRED BY THE RFP.

YES _____ NO _____

How many years of experience similar to the type of operation proposed can the proposer document? (Anything less than one year is insufficient.) _____ Years

SIMILAR PROJECTS COMPLETED BY PROPOSER (if applicable)

Name of Project _____ Date Completed _____

Description: _____

Name of Project _____ Date Completed _____

Description: _____

OPTION G -- MANAGERIAL OVERSIGHT

**THE SUPERIOR PROPOSAL WILL HAVE AN ON-SITE MANAGER FAMILIAR WITH
HISTORIC PROPERTIES OR STRUCTURES.**

REQUIREMENT H – MANAGEMENT BACKGROUND

**(1) THE COMPETENCE OF THE PROPOSER AS REFLECTED IN THE FORM, TO MANAGE
AND OPERATE THE SPECIFIC TYPES OF BUSINESS ACTIVITIES REQUIRED IN THIS RFP.**

**(2) THE ENTITY WITH WHICH NPS WILL LEASE AND ITS RELATIONSHIP TO SUPERIOR
AND SUBORDINATE ENTITIES IS CLEARLY DEFINED.**

A. Status (circle)

Individual

Corporation

Non-Profit/Charitable Institution/Foundation

Partnership

Joint Venture

B. Structure of your current operation: (Provide an organizational chart) _____

C. Ownership (include all partners in partnership if applicable):

Names and Addresses of Owners (Corp: Show Controlling Interest; Close Corp: Show All)	Number and Type of Shares or Percentage of Ownership	Total Current Value of Investment
_____	_____	_____
_____	_____	_____
_____	_____	_____
TOTAL OF ALL OWNERS:	_____	_____
TOTAL SHARES OUTSTANDING:	_____	_____

D. If a corporation, list the names, addresses, and titles of corporate officers and the names and affiliations of the members of the Board of Directors: (Attach continuation sheets as necessary.)

Name	Address	Title
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

State of Incorporation: _____

E. The following attachments must be provided as applicable for each subject of the form:

1. For a Corporate proposer: Articles of Incorporation and Bylaws and a certificate from the state of incorporation indicating that the corporation is in "good standing."
2. For proposers who are Partnerships: Partnership Agreements or Joint Venture Agreements.
3. For contracts relating to the management of any aspect of the proposed operation, in effect or proposed: Copies of those agreements or contracts.

(If the above materials are not yet available, provide draft documents or state when they will be available and give a brief summary of the anticipated important provisions.)

**F. INDIVIDUAL EXPERIENCE AND RELATED BACKGROUND OF CORPORATE
MANAGEMENT STRUCTURE**

1. INDIVIDUAL'S NAME: _____
 2. NAME OF EMPLOYER: _____
 3. ADDRESS: _____
 4. TELEPHONE NUMBER and FAX NUMBER: _____
 5. NATURE OF BUSINESS: _____
 6. EXACT TITLE OF POSITION: (indicate if self-employed) _____
 7. DATES OF EMPLOYMENT: (from; to) _____
 8. NUMBER OF PEOPLE SUPERVISED: _____
 9. DESCRIPTION OF DUTIES AND RESPONSIBILITIES: _____
 10. EDUCATION, DEGREES, AND SPECIAL SKILLS: _____
 11. ROLE IN PROPOSED BUSINESS and QUALIFICATIONS FOR THAT ROLE: _____
-

**OPTION H -- MANAGEMENT BACKGROUND
NONE.**

***** ***** ***** ***** *****

REQUIREMENT I – HEALTH AND SAFETY

**DEMONSTRATED UNDERSTANDING OF AND THE ABILITY TO IMPLEMENT HEALTH
AND SAFETY PROGRAMS APPROPRIATE TO THE OPERATION PROPOSED AND A
WILLINGNESS TO MEET THE REQUIREMENTS OF THE PARK FOR SPECIFIC
PROGRAMS.**

Describe all prior experiences with health and safety programs. (Attach continuation sheets as
necessary.)

OPTION I -- HEALTH AND SAFETY

NONE.

IV. FINANCE PLANNING: The following information is necessary for the National Park Service to make an informed evaluation of the proposer's financing plan. The proposer should submit as much additional information as he/she believes will be useful in evaluating financial reliability and track record.

REQUIREMENT J – FINANCIAL

THE PROPOSER DEMONSTRATES THAT NEEDED FUNDING (EQUITY AND/OR BORROWED) IS AVAILABLE AND IS DEMONSTRATED TO BE SUPPORTABLE WITHIN THE PRO FORMA INCOME STATEMENT AND BALANCE SHEETS REQUIRED.

A. FINANCIAL CONDITION

Financial capability of the proposer as of _____, 2001, is as reflected in the attached Financial Statement.

ATTACH A CERTIFIED FINANCIAL STATEMENT LISTING ASSETS AND LIABILITIES, FULLY ITEMIZED IN ACCORDANCE WITH ACCEPTED ACCOUNTING STANDARDS.

B. INVESTMENT ANALYSIS:

First Year Sources and Uses of Cash

1. SOURCES OF CASH

Contributions
(Personal Funds) _____
Construction Loan
(if applicable) _____
Permanent Loan
(if applicable) _____

2. USES OF CASH

Rent _____
Operating Expenses _____
Legal Fees, Insurance Mortgage Payments
(if applicable) _____
Construction Costs Interest on
Construction Loan _____
Loan Fee-
Construction Loan _____
Loan Fee-
Permanent Loan _____

Payoff Construction Loan _____

3. FIRST YEAR CASH FLOW
(before depreciation and taxes) _____

C. CREDIT REFERENCES

List **three** trade or bank references. At least one of the three should be a lending institution from which the proposer has previously obtained permanent financing. **Attach this form to a letter authorizing trade or bank reference responses to inquiries from the National Park Service.**

1. _____
Name Address

City/Town State Zip

2. _____
Name Address

City/Town State Zip

3. _____
Name Address

City/Town State Zip

D. PRESERVATION MAINTENANCE

Estimate preservation maintenance expenses (e.g., future repair/replacement of roofing, shingling, trim, doors and windows etc. required throughout the lease period).

Item Cost

E. GUARANTEES AND SECURITY

Describe the financial mechanism(s) by which the proposer will guarantee payment or rent and the performance of all other obligations under the lease.

**OPTION J – FINANCIAL
NONE.**

***** ***** ***** ***** *****

F. INSURANCE

REQUIREMENT K -- INSURANCE

**THE PROPOSER AGREES TO PROVIDE AND MAINTAIN THE REQUIRED INSURANCE
COVERAGE THROUGHOUT THE LIFE OF THE LEASE AGREEMENT. THE NPS WILL BE
NAMED AS ADDITIONALLY INSURED.**

YES _____ NO _____

Describe the proposer's financial ability to pay bona fide claims for bodily injury, death or property damage. Identify source(s) of funds available to restore or reconstruct the property if it is destroyed or damaged.

**OPTION K -- INSURANCE
NONE.**

***** ***** ***** ***** *****

G. CERTIFICATION

I (We)_____certify that this proposal form and the attached evidence of the proposer's qualifications and financial responsibility, including financial statement, are true and correct to the best of my (our) knowledge and belief.

Signature

Name (print)

Signature

Name (print)

Date

Address

City/Town

State

Zip

